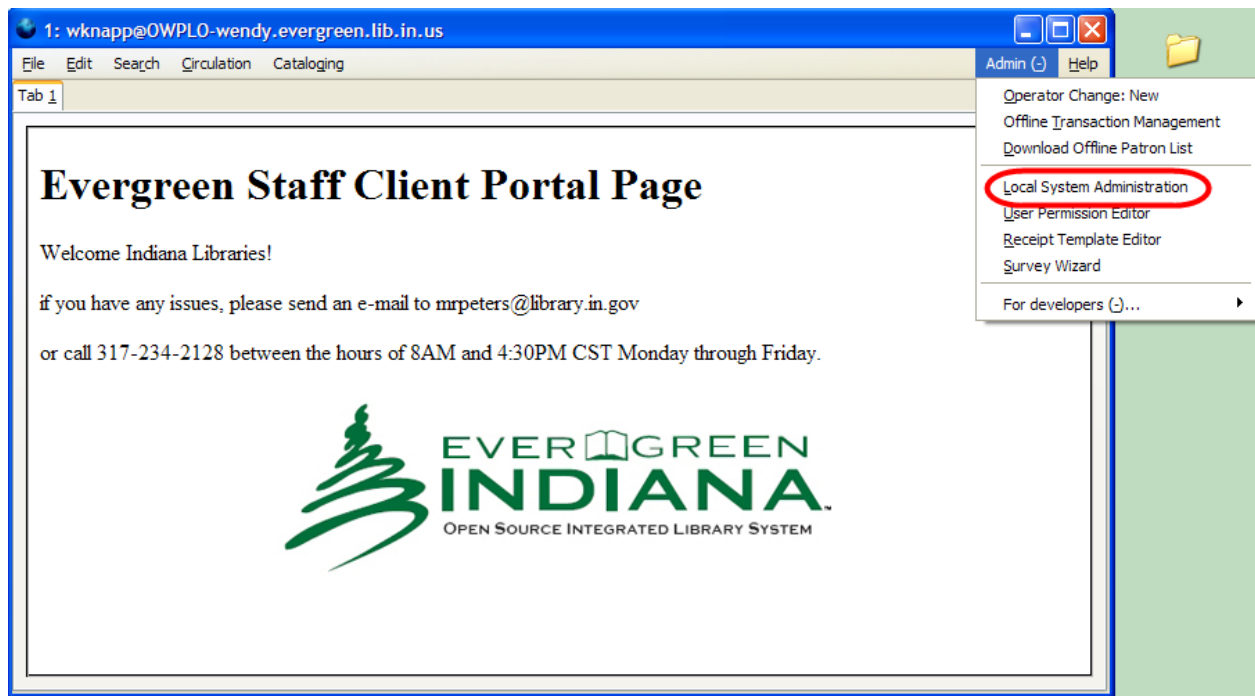


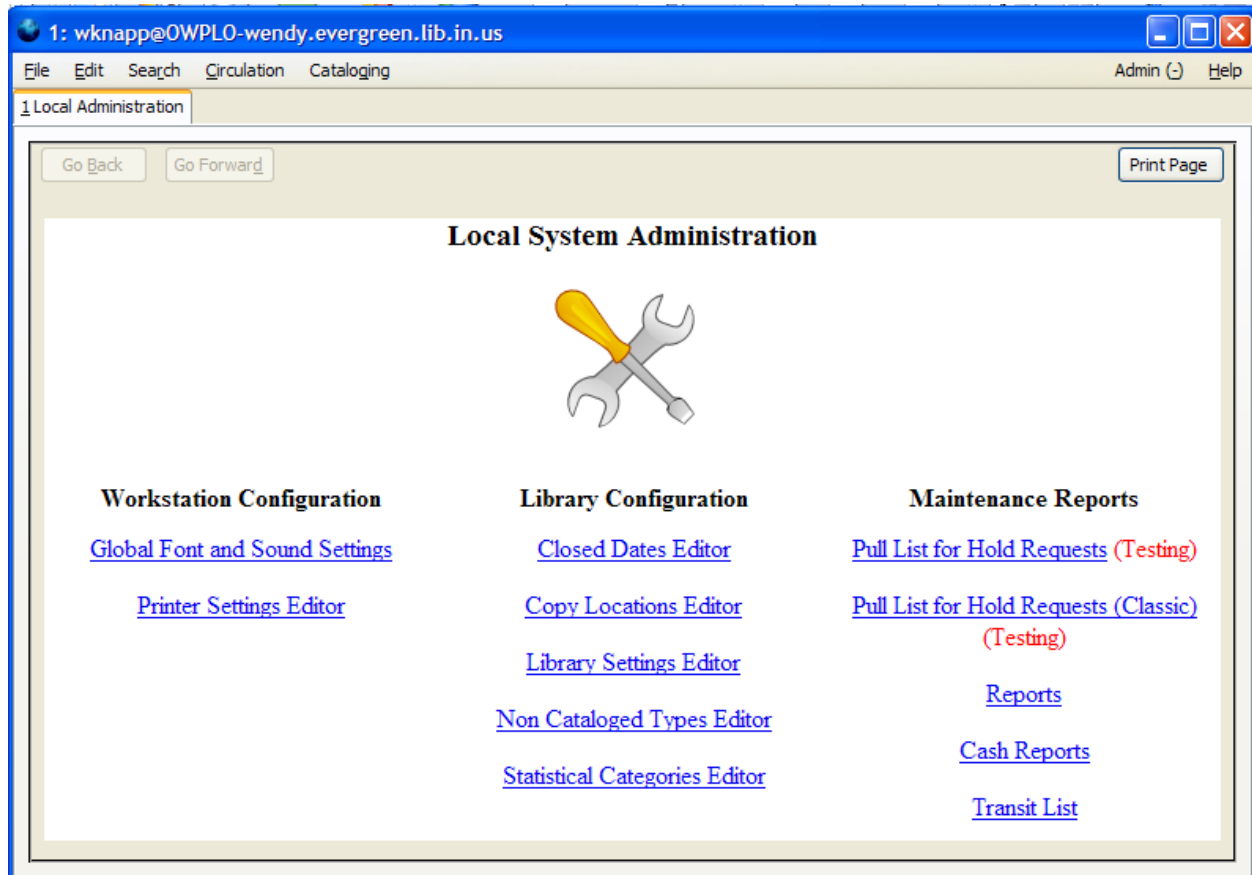


Admin Training



Reports are an Admin Function

You can run the reports from the Local System Administration



Some of the most common reports are listed under Maintenance Reports

Pull List for Hold Requests

Pull List for Hold Requests (Classic)

Pull Lists are automatically associated with the library with which your workstation is registered. You can choose the format you prefer. Most libraries prefer the "Classic" format because they like the way it prints.

Cash Reports

You can select the time frame

- so if you make a deposit on Monday for Friday, Saturday, and Sunday you can select the three days
- then Tuesday, you just select Monday's date

1: wknapp@OWPLO-wendy.evergreen.lib.in.us

File Edit Search Circulation Cataloging Admin (-) Help

Local Administration

Go Back Go Forward Print Page

Start Date: 2008-11-30 End Date: 2008-11-30
(YYYY-MM-DD)

View reports for : Plainfield-Guilford Township Public Library

Go!

Welcome **wknapp**

Desk Payments

<u>workstation</u>	<u>cash_payment</u>	<u>check_payment</u>	<u>credit_card_payment</u>
PLFDP-CIRCDESK02	72.6		
PLFDP-CIRCDESK03	4.85		

User Payments

<u>usr</u>	<u>credit_payment</u>	<u>forgive_payment</u>	<u>work_payment</u>	<u>goods_payment</u>
<u>plfd-circ</u>		1.25		

Transit List

You can select to see either the item on their way to your library (Transit to)

1: wknapp@OWPLO-wendy.evergreen.lib.in.us

File Edit Search Circulation Cataloging Admin (-) Help

1 Local Administration 2 Transits

Transit Filter

Transit Library

Transit to: JCPLC Crothersville Branch

Transit Date falls between

Today Today - 7 days

Retrieve Transits

Transits

Print Transits Actions for Selected Transits

Barcode	Title	Transit Destination	Transit Source	Transitted On	Request Date
37500003044787	Leatherheads	JCPLC	JCPLS	2008-11-29T15:12:07-0...	2008-09-30
37500002193296	Christmas, pres...	JCPLC	JCPLS	2008-11-29T14:53:19-0...	
34330511507056	The life of Eliza...	JCPLC	LBPLL	2008-11-29T08:41:18-0...	2008-11-26
34330512237083	The official 200...	JCPLC	LBPLL	2008-11-29T08:41:00-0...	2008-11-26
37500003045990	A Christmas sta...	JCPLC	JCPLM	2008-11-28T14:13:10-0...	2008-11-24
37500002368948	Anne of Green ...	JCPLC	JCPLM	2008-11-28T14:12:13-0...	2008-11-26
34194000515313	Living dead in D...	JCPLC	UCPLB	2008-11-28T09:36:22-0...	2008-11-26
34194000231598	Sea swept	JCPLC	UCPLB	2008-11-28T09:32:37-0...	2008-11-25
34194000664210	A Christmas pr...	JCPLC	UCPLB	2008-11-28T09:29:45-0...	2008-11-24
34207000796863	The six wives o...	JCPLC	APLSD	2008-11-28T09:00:50-0...	2008-11-26
34194000613779	A quick bite	JCPLC	FRPLB	2008-11-28T08:45:01-0...	2008-11-15
34207001163535	In the eye of h...	JCPLC	APLSD	2008-11-26T14:23:11-0...	2008-11-25
33946001790505	The observatio...	JCPLC	HMMPL	2008-11-26T12:21:33-0...	2008-11-25

Or you can select the items your library has sent out (Transit From)

1: wknapp@OWPLO-wendy.evergreen.lib.in.us

File Edit Search Circulation Cataloging Admin (-) Help

1 Local Administration 2 Transits

Transit Filter

Transit Library

Transit from: JCPLC Crothersville Branch

Transit Date falls between

Today Today - 7 days

Retrieve Transits

Transits

Print Transits Actions for Selected Transits

Barcode	Title	Transit Destination	Transit Source	Transitted On	Request Date
37500002235311	Highland angel	JCPLS	JCPLC	2008-11-29T15:56:59-0...	
37500003046329	Pieces of my he...	JCPLBKM	JCPLC	2008-11-29T15:56:26-0...	
37500002761910	The essential g...	JCPLS	JCPLC	2008-11-29T15:55:39-0...	
37500003042666	Baby mama	JCPLS	JCPLC	2008-11-29T14:59:38-0...	2008-11-25
37500002891014	Halloweentown...	JCPLS	JCPLC	2008-11-29T13:40:29-0...	
37500002905483	The cable guy	JCPLS	JCPLC	2008-11-29T12:13:11-0...	
37500002403943	October sky	JCPLS	JCPLC	2008-11-29T11:53:16-0...	2008-11-29
37500002779516	Uglies	JCPLS	JCPLC	2008-11-29T11:49:33-0...	
37500002235311	Highland angel	JCPLS	JCPLC	2008-11-29T15:56:59-0...	
37500003046329	Pieces of my he...	JCPLBKM	JCPLC	2008-11-29T15:56:26-0...	
37500002779508	Specials	JCPLS	JCPLC	2008-11-29T11:49:07-0...	2008-11-26
37500002580526	Who's afraid of...	JCPLS	JCPLC	2008-11-29T11:48:48-0...	
37500002761910	The essential g...	JCPLS	JCPLC	2008-11-29T15:55:39-0...	

Other Reports (including Overdue Notices and Circulation Reports) can be run by selecting **Maintenance Reports → Reports**

The first thing you'll need to do is create subfolders for your library

The choices you must make are

- Folder Name
- Share or Do Not Share
- If you choose to Share, with whom

It's a good rule of thumb to _____ your reports. Other libraries in Evergreen Indiana will be sharing their reports to benefit the consortium. It's also easier for the Evergreen Helpdesk to troubleshoot if you've shared your reports. It's possible that your library will never have to write a new report.

You'll create a subfolder in both Reports and Templates

1: wknapp@OWPLO-wendy.evergreen.lib.in.us

File Edit Search Circulation Cataloging Admin (-) Help

Local Administration

Go Back Go Forward Print Page

You are logged in as wknapp

[Manage Folder Contents](#)

Wendy: created by wknapp

View report output

Limit output to 10 Pending Items

No items to display

Limit output to 10 Completed Items

Select	report	run_time	complete_time	runner	email	folder	e
<input type="checkbox"/>	28 days overdue pl	2008-11-26 15:48	2008-11-26 15:49	wknapp		45	
<input type="checkbox"/>	Holds week	2008-11-26 15:26	2008-11-26 15:26	wknapp		45	
<input type="checkbox"/>	Holds	2008-11-26 15:13	2008-11-26 15:14	wknapp	wknapp@library.in.gov	45	
<input type="checkbox"/>	28 days	2008-11-26	2008-11-26				

Within the **Shared Folders** Menu, there are dozens of reports you can use to run reports specific to your library. Creating reports from templates requires only that you select certain data options. You can then print or email the report. If you choose to email the report to another staff member, they will receive a hyperlink they can use to access the report with their Evergreen Indiana Log in.

Open the **Templates** → **admin** → **EI_Templates**

The categories available include

- Holds Reports
- Customer Reports
- Item Reports
- Overdue Notice Templates
- Bibliographic Reports
- Circulation Reports
- EI Testing (we won't deal with this category)
- Bills Reports

We'll look at a couple of templates and create reports for our library from these, starting with Customer Reports

Customer Reports

1: wknapp@OWPLO-wendy.evergreen.lib.in.us

File Edit Search Circulation Cataloging Admin (-) Help

Local Administration

Go Back Go Forward Print Page

Customer: created by admin

Create a new report from selected template Submit

Limit output to 10

Select All None	name	description	create_time	owner
<input type="checkbox"/>	List of items chosen by owning library, Item copy status, Multiple fine stop reasons	A list of items chosen by owning library, Item copy status, multiple fine stop reasons. Output is library name, call number, title, item barcode, shelving location, status, last edited date, customer first and last name, customer barcode. Commonly used for Claims returned	2008-10-29 05:25	admin
<input type="checkbox"/>	Total Users by Library	Count of Users at selected libraries.	2008-10-10 09:17	admin
<input checked="" type="checkbox"/>	Count of new library cards by profile.	List of new card per specified date range.	2008-10-01 15:17	admin
<input type="checkbox"/>	List Users by Profile Group	List of Users at selected libraries, broken down by Profile Group, Library Card, Name, Address and Expiration Date.	2008-09-30 13:47	admin

My Folders

- Templates
- Reports
- Wendy (BZPLB)
- Output
- Wendy (BZPLB)

Shared Folders

- Templates
- admin
 - El Templates (EG-IN)
 - Holds (EG-IN)
 - Customer (EG-IN)
 - Item (EG-IN)
 - Overdue Notice Templates (EG-IN)
 - Bib (EG-IN)
 - Circulation (EG-IN)

Note that the Template Name and description provide a lot of detail for what kind of report you'll get.

When you select the template you want to use, you'll **Create a new report from selected template**

The first required field is the report name.

1: wknapp@OWPLO-wendy.evergreen.lib.in.us

File Edit Search Circulation Cataloging Admin Help

1 Local Administration

Go Back Go Forward Print Page

My Folders

- Templates
- Reports
- Output

Shared Folders

- Templates
- admin
 - EI_Templates (EG-IN)
 - Holds (EG-IN)
 - Customer (EG-IN)
 - Item (EG-IN)
 - Overdue Notice Templates (EG-IN)
 - Bib (EG-IN)
 - Circulation (EG-IN)
 - EI testing (EG-IN)

Template Name: Count of new library cards by profile.

Template Creator: admin

Template Description: List of new card per specified date range.

Report Name: **New cards**

Report Description:

Report Columns: Short (Policy) Name
Record Creation Date/Time
Group Name
User ID

Pivot Label Column: -- Select One (optional) --

Pivot Data Column: User ID

Choose a folder to store this report definition: Selected Folder: Report Folders
Wendy

Column Transform Action User Params

Next, though less obvious, you have to select the **folder to store this report definition**. When you have selected the folder, it will appear as the bolded Selected Folder

1: wknapp@OWPLO-wendy.evergreen.lib.in.us

File Edit Search Circulation Cataloging Admin Help

1 Local Administration

Go Back Go Forward Print Page

My Folders

- Templates
- Reports
- Output

Shared Folders

- Templates
- admin
 - EI_Templates (EG-IN)
 - Holds (EG-IN)
 - Customer (EG-IN)
 - Item (EG-IN)
 - Overdue Notice Templates (EG-IN)
 - Bib (EG-IN)
 - Circulation (EG-IN)
 - EI testing (EG-IN)

Template Name: Count of new library cards by profile.

Template Creator: admin

Template Description: List of new card per specified date range.

Report Name: New Library Cards

Report Description:

Report Columns: Short (Policy) Name
Record Creation Date/Time
Group Name
User ID

Pivot Label Column: -- Select One (optional) --

Pivot Data Column: User ID

Choose a folder to store this report definition: **Selected Folder: Wendy**
Report Folders
Wendy

Column Transform Action User Params

Next we choose the parameters (the date and our library)

Column	Transform	Action	User Params
ILS User -> Record Creation Date/Time	Year + Month	In list	Real Date ▼ 2008-11 Add Del 2008-11
ILS User -> Home Library	Raw Data	In list	PLFDP UCPL UCPLB ZPL HMMPL ▼ Add Del HMMPL

Output Options

And we'll choose the Output options

- For all reports, it's a good idea to choose the _____ output
- For the training, go ahead and run the report ASAP, so we can get the results
- If you can access your email, go ahead and send the report to yourself
- And choose the Output subfolder you created

Output Options

- ☒ Excel Output
- ☐ CSV Output
- ☒ HTML Output
 - ☒ Bar Charts
 - ☐ Line Charts

Recurring Report: ☐

Recurrence Interval: 1 Day(s)

Run ASAP ☒ or at: 2008-11-30 at Midnight

Send completion notification to this Email address: wknapp@library.in.gov

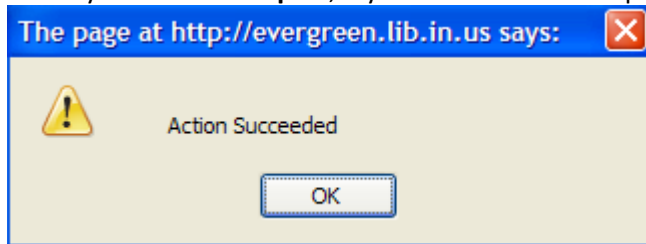
Choose a folder to store this report's output: Selected Folder: Wendy

Output Folders

Wendy

Save Report

When you **Save** the **Report**, if you filled in all the required fields, you'll get the following notification



Clicking OK will take you back to the template list. You'll need to navigate to the Output folder you created earlier, and chose as **the folder to store this report's output**.

1: wknapp@OWPLO-wendy.evergreen.lib.in.us

File Edit Search Circulation Cataloging Admin (-) Help

Local Administration

Go Back Go Forward Print Page

You are logged in as **wknapp**

My Folders

- Templates
- Reports
- Output
 - Wendy (BZPLB)

Shared Folders

- Templates
- admin
- ucpl-globaladmin
- icpl-globaladmin
- Reports
- Output

Manage Folder Contents **Manage Folder**

Wendy: created by wknapp

View report output

Limit output to 10 Pending Items

No items to display

Limit output to 10 Completed Items

Select	report	run_time	complete_time	runner	email	folder	error_text	excel_format	html_format	csv_format
<input checked="" type="checkbox"/>	New Library Cards	2008-11-30 19:13	2008-11-30 19:13	wknapp	wknapp@library.in.gov	45		t	t	f
<input type="checkbox"/>	28 days overdue pl	2008-11-26 15:48	2008-11-26 15:49	wknapp		45		t	t	f
<input type="checkbox"/>	Holds week	2008-11-26 15:26	2008-11-26 15:26	wknapp		45		t	t	f

Next, choose the Circulation Templates from the EI Admin template shared folder.

- Choose Monthly Circ by Circulation Modifier
- Name the report (use training and the date in the title)
- Choose the folder to store this report definition (the one you created)
- In the User Parameters, you will add the library and choose a date
- Select the Output Options (CSV, HTML, and Bar Charts) checked
- For this training, run the report ASAP
- Send the email notification to yourself.
- And choose the folder to store this report's output (the one you created)
- Save the Report

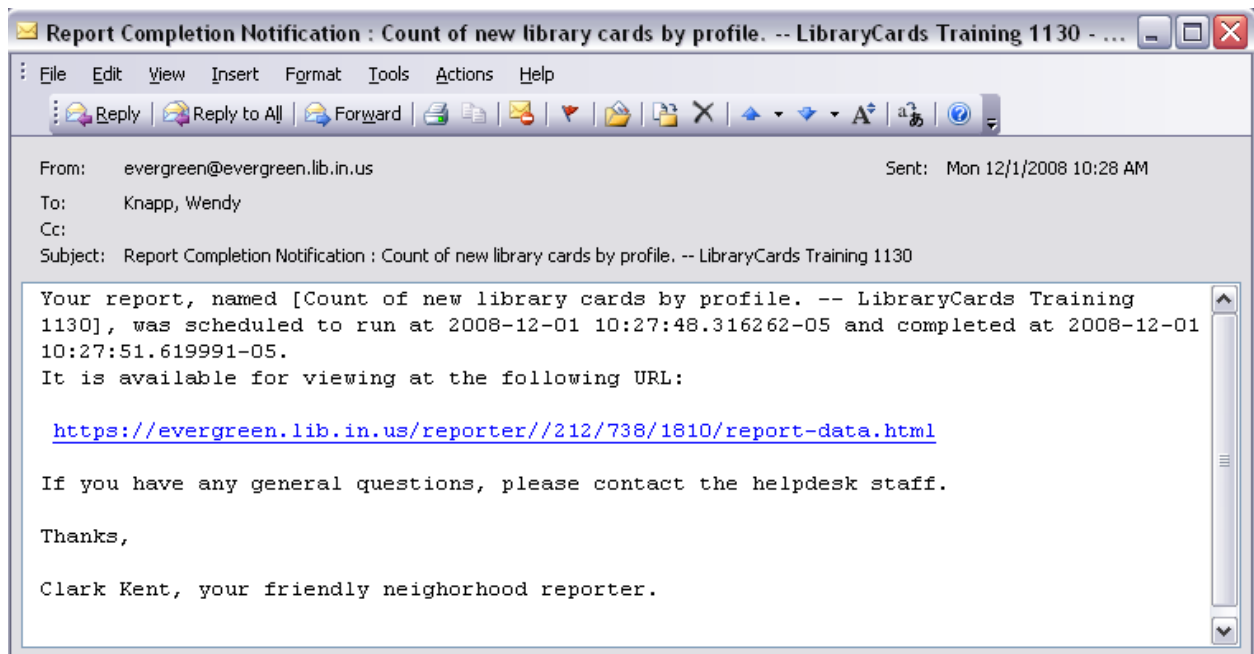
When you see Action Succeeded, you'll be redirected to the template page

- Navigate to your Output subfolder
- Select the Circ Modifier report you just created
- Next to **View Report Output**, click **Submit**

When you see the bar chart, you can select the tabular output to view that this time.

Remember **CRTL + W** closes tabs

Check your email to see that you have two emails (one for each report created). Each one will have a URL which you can use to access the reports.



Also in the Local System Admin

Closed Dates Editor

You can set single dates that the library is closed (most holidays)

You can set multi dates that the library is closed (for a remodel)

You can set details (if the library will open late or close early due to weather)

Printer Settings Editor

Check your default printer (stays with the computer, not the user logged in)

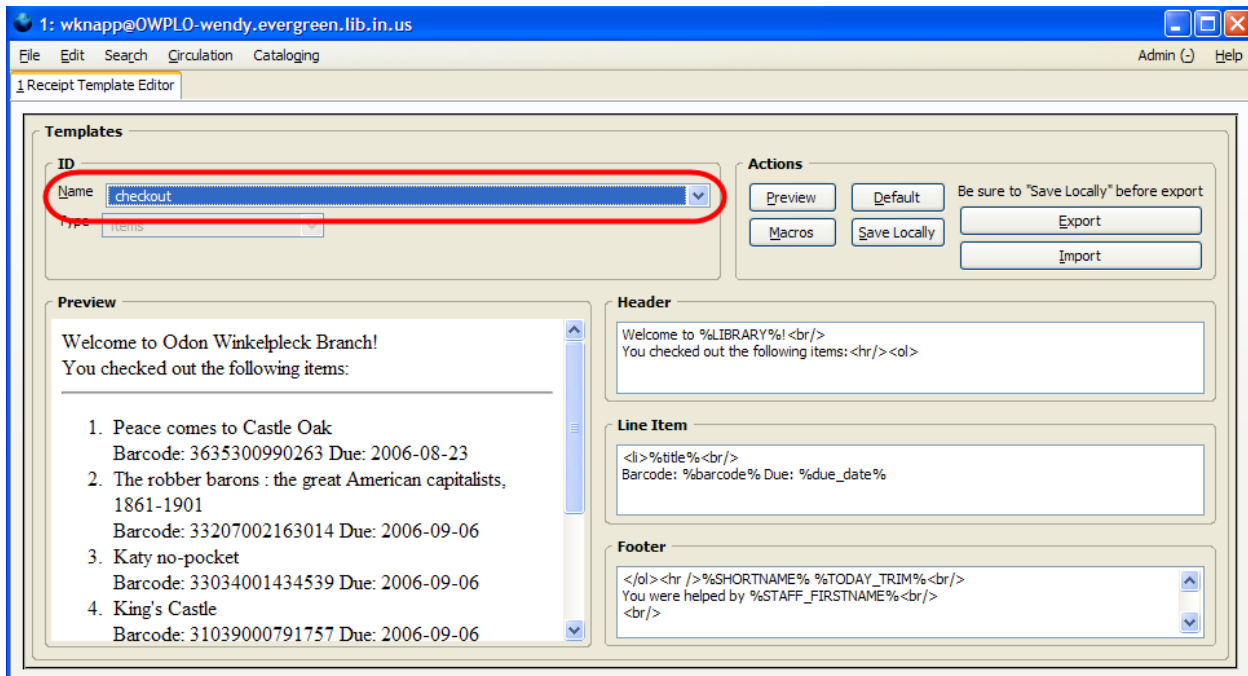
Print the test page (use the Cute PDF writer or other image software for training)

Another Admin Function

Receipt Template Editor



Let's add some information to the Checkout Receipt:



To the footer add closing dates for an upcoming holiday

1: wknapp@OWPLO-wendy.evergreen.lib.in.us

File Edit Search Circulation Cataloging Admin (-) Help

1 Receipt Template Editor

Templates

ID

Name: checkout

Type: items

Actions

Preview Default Be sure to "Save Locally" before export

Macros Save Locally Export Import

Preview

Welcome to Odon Winkpleck Branch!

You checked out the following items:

1. Peace comes to Castle Oak
Barcode: 3635300990263 Due: 2006-08-23
2. The robber barons : the great American capitalists, 1861-1901
Barcode: 33207002163014 Due: 2006-09-06
3. Katy no-pocket
Barcode: 33034001434539 Due: 2006-09-06
4. King's Castle
Barcode: 31039000791757 Due: 2006-09-06

Header

Welcome to %LIBRARY%!

You checked out the following items:

Line Item

%title%

Barcode: %barcode% Due: %due_date%

Footer

%SHORTNAME% %TODAY_TRIM%

You were helped by: %STAFF_FIRSTNAME%

Library will be closed 12/24 and 12/25

View the change in the preview

1: wknapp@OWPLO-wendy.evergreen.lib.in.us

File Edit Search Circulation Cataloging Admin (-) Help

1 Receipt Template Editor

Templates

ID

Name: checkout

Type: items

Actions

Preview Default Be sure to "Save Locally" before export

Macros Save Locally Export Import

Preview

1861-1901
Barcode: 33207002163014 Due: 2006-09-06

3. Katy no-pocket
Barcode: 33034001434539 Due: 2006-09-06
4. King's Castle
Barcode: 31039000791757 Due: 2006-09-06
5. Katy no-pocket
Barcode: 33034001434539 Due: 2006-09-06

OWPLO 2008-11-30 19:55
You were helped by: Wendy
Library will be closed 12/24 and 12/25

Header

Welcome to %LIBRARY%!

You checked out the following items:

Line Item

%title%

Barcode: %barcode% Due: %due_date%

Footer

%SHORTNAME% %TODAY_TRIM%

You were helped by: %STAFF_FIRSTNAME%

Library will be closed 12/24 and 12/25

To add this to each computer that will check out to patrons, first choose Save Locally

The screenshot shows the 'Receipt Template Editor' window. The 'ID' section has 'Name' set to 'checkout' and 'Type' set to 'items'. The 'Actions' section contains buttons for 'Preview', 'Default', 'Macros', 'Save Locally' (highlighted with a red circle), 'Export', and 'Import'. A note above the 'Export' button says 'Be sure to "Save Locally" before export'. The 'Preview' section displays a list of items: 1861-1901, 3. Katy no-pocket, 4. King's Castle, and 5. Katy no-pocket, each with a barcode and due date. The 'Header' section contains a welcome message and a list of items. The 'Line Item' section shows a template for a line item. The 'Footer' section contains a closing message and a note about library closure dates.

You can then Export the file to a flash drive

The screenshot shows the 'Receipt Template Editor' window, identical to the previous one, but with the 'Export' button in the 'Actions' section highlighted with a red circle. The 'ID' section has 'Name' set to 'checkout' and 'Type' set to 'items'. The 'Actions' section contains buttons for 'Preview', 'Default', 'Macros', 'Save Locally', 'Export' (highlighted), and 'Import'. A note above the 'Export' button says 'Be sure to "Save Locally" before export'. The 'Preview' section displays a list of items: 1861-1901, 3. Katy no-pocket, 4. King's Castle, and 5. Katy no-pocket, each with a barcode and due date. The 'Header' section contains a welcome message and a list of items. The 'Line Item' section shows a template for a line item. The 'Footer' section contains a closing message and a note about library closure dates.

You can log onto each computer that does checkouts, go back to the Admin→Receipt Template Editor, and Import the file you saved to the flash drive

The screenshot shows the 'Receipt Template Editor' window in a web browser. The browser's address bar displays '1: wknapp@OWPLO-wendy.evergreen.lib.in.us'. The window has a menu bar with 'File', 'Edit', 'Search', 'Circulation', and 'Cataloging'. The title bar of the application window is '1 Receipt Template Editor'. The interface is divided into several sections:

- Templates:** Contains an 'ID' section with a 'Name' dropdown set to 'checkout' and a 'Type' dropdown set to 'items'.
- Actions:** A group of buttons including 'Preview', 'Default', 'Macros', 'Save Locally', 'Export', and 'Import'. The 'Import' button is circled in red. A note above the buttons says 'Be sure to "Save Locally" before export'.
- Preview:** A large text area showing a sample receipt. It includes item details like '1861-1901', 'Barcode: 33207002163014 Due: 2006-09-06', and a list of items checked out: '3. Katy no-pocket', '4. King's Castle', and '5. Katy no-pocket'. At the bottom, it shows the date and time 'OWPLO 2008-11-30 19:55' and a message 'You were helped by Wendy'.
- Header:** A text area containing the header text: 'Welcome to %LIBRARY%!
You checked out the following items:
'.
- Line Item:** A text area containing the line item format: '%title%
Barcode: %barcode% Due: %due_date%'.
- Footer:** A text area containing the footer format: '
%SHORTNAME% %TODAY_TRIM%
You were helped by %STAFF_FIRSTNAME%
Library will be closed 12/24 and 12/25
'.

The reports in Evergreen Indiana Templates

Holds:

Hold count by date range

Count of filled holds on titles by pick up library. Display of pickup library, number of holds without canceled holds.

Hold Based Purchase Alert New

Count of unfilled holds on titles by pick up library. Display of pickup library, title, author, number of holds, number of copies library owns, and date first hold was placed.

Cleans Holds Shelf - HMMPL (clone)

Determines cancelled holds from previous day. This report will also include staff cancelled holds.

*****This report actually gives you the holds that have been on the shelf for 7 days, and no one has picked them up.*****

Unfilled Holds(test)

List of patrons with unfilled holds by pick up library and hold placement date range. Display of pickup library, title, author, patron barcode, patron name, hold type, and hold placement date.

Customer:

List of items chosen by owning library, Item copy status, Multiple fine stop reasons

A list of items chosen by owning library, Item copy status, multiple fine stop reasons. Output is library name, call number, title, item barcode, shelving location, status, last edited date, customer first and last name, customer barcode. Commonly used for Claims returned

Total Users by Library

Count of Users at selected libraries.

Count of new library cards by profile.

List of new card per specified date range.

List Users by Profile Group

List of Users at selected libraries, broken down by Profile Group, Library Card, Name, Address and Expiration Date.

Item:**Count of Items added in the last X months**

Count of Items by added in the last X months. Display of library, circ modifier and count.

Count of Items Deleted in the last X months

Count of Items by deleted after X days ago. Display of library, circ modifier and count.

List item with a Total Use Count by Item Creation Date by entering the multi-barcode of the item HMMP

List items with total use count filtered by library, creation date, shelving location, on and before a selected date selected by multi-barcode. This is for use counts circulated from Evergreen and SIRSI

*****Most libraries will not need this report.*****

Total Items Count by Library

Count of total items at selected library

Items received for hold by Date

Count of Items received to other libraries to fulfill a hold by date.

Items transited to other libraries for hold by Date

Count of Items transited to other libraries to fulfill a hold by date.

List of Items added in the last X days

List of Items by added after X days ago. Display of library, deletion date, title, author, call number, barcode, status. location and circ modifier

List of Items Deleted in the last X days

List of Items by deleted after X days ago. Display of library, deletion date, title, author, call number, barcode and circ modifier

List item with a Total Use Count by Item Creation Date by entering the barcode of the item HMMPL

List items with total use count filtered by library, creation date, shelving location, on and before a selected date selected by barcode. This is for use counts circulated from Evergreen and SIRSI

*****Most libraries will not need this report.*****

Overdue Notice Templates:**Long Overdues "Between" dates and Circulating Library**

Used for creating 28 and 45 day overdue mail merge

Bib Templates:**Total Bib\Titles Count by Library**

Count of total Bib\titles at selected library

Circulation Templates:

Patron by Patron Items Out Count

Count of items out by patron barcode, Patron Home Library, Circulating Library. Filtered by Library Org Unit. (CSV Output Recommended)

Monthly Total Circ by Profile

Count of circulations at selected libraries by month by profile.

Total Circ date

Count of circulations at selected libraries by selected date.

Monthly Circ by Circulation Modifier and Shelving Location

Count of circulations at selected libraries by month, broken down by circ modifier and Shelving Location.

Monthly Total Circ by Circulation

Count of circulations at selected libraries by month.

Monthly Circ by Circulation Modifier

Count of circulations at selected libraries by month, broken down by circ modifier.

Bills Templates:

Monthly Detailed Payments Received

Monthly detailed cash report by payment per transaction from X number of months ago. Note: this does not include forgive, work, voids, and future goods payments.

Detailed Payments Received by date range

Detailed cash report by payment per transaction within date range. Note: this does not include forgive, work, voids, and future goods payments.

A common error

If you lose your network connection (training on a wireless network, this can happen), you'll see the following errors:

